DOCUMENT RESUME

ED 312 774 EA 021 432

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TITLE Strategic Planning. ERIC Digest Series Number EA 41.
INSTITUTION ERIC Clearinghouse on Educational Management, Eugene, Oreg.
SPONS AGENCY Office of Educational Research and Improvement (ED), Washington, DC.
PUB DATE 89
CONTRACT OERI-R188062004
NOTE 4p.
AVAILABLE FROM Publication Sales, ERIC Clearinghouse on Educational Management, University of Oregon, 1787 Agate Street, Eugene, OR 97403 ($2.50 prepaid postage and handling).
PUB TYPE Information Analyses - ERIC Information Analysis Products (071)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS *Cooperative Planning; Educational Objectives; *Educational Planning; Elementary Secondary Education; *Long Range Planning; Master Plans
IDENTIFIERS ERIC Digests; *Strategic Planning

ABSTRACT

Within the field of education, the act of planning implies that the schools are more than passive pawns in the hands of socioeconomic forces. The current profound demographic changes, which will continue to reshape the nation and its schools in the coming decades, make strategic planning particulary important. Implementing a strategic plan first involves summarizing and documenting the district's purpose and operations, what it wants to accomplish, and what it does; everyone concerned with public education should participate in the strategic plan's creation. Further, the strategic plan should be fully discussed and publicized before it is implemented; must find its way into the district's budget and job descriptions; and should be for the duration of at least 5 years with annual reviews. (8 references) (KM)

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ERIC Clearinghouse on Educational Management

ERIC Digest Series
Number EA 41 • 1989

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STRATEGIC PLANNING

By David Peterson

Most school board members and district administrators instinctively like the idea of strategic planning. Many of them, however, confess to being confused over exactly what it is and what it requires. Strategic planning, writes William Cook, Jr. (1988), is "aimed at total concentration of the organization's resources on mutually predetermined measurable outcomes." An effective plan, by this definition, encompasses an organization's entire resources and purpose. It must be constructed deliberately and thoughtfully.

What are the benefits of strategic planning?

Many benefits of planning are patently obvious. An organization simply cannot know what it is doing and what it intends to do unless it periodically establishes and monitors its goals. Strategic planning enables people to influence the future. The very act of planning implies that schools are more than passive pawns in the hands of socioeconomic forces.

Such forces will soon overwhelm districts that refuse to plan for them. Harry Cooper (1985) identifies several trends that already strongly affect schools: an aging population, a growing proportion of minority students, and growing numbers of special interest groups competing for scarce public resources.

In 1983, the American Association of School Administrators (AASA) in its publication *Planning for Tomorrow's Schools*, identified several other key developments that continue to demand the attention of many school districts. School officials must plan for shortages of teachers, particularly in math, science, and bilingual education, and they must prepare to accommodate growing numbers of Hispanic students, many of whom will not speak English. More students of all types will continue to come from single-parent homes.

These profound demographic changes will continue to reshape the nation and its schools in the coming decades. They make strategic planning particularly important.

How does a district develop a strategic plan?

A strategic plan begins with a mission statement. This document briefly summarizes the district's purpose and operations, what it wants to accomplish, and what it does. All the organization's goals should support this statement.

Cooper recommends that those participating in the planning process then identify major trends affecting the school district. What are their influence? Which most demand attention, and which can be most effectively responded to? Answering such questions enables planners to determine which trends should play the largest role in molding their plan.

Most authors recommend a less structured approach to the initial planning process. Cook asserts that "the best plans are based more on the collective intuition of the planning team than on so-called hard data." He urges planning teams to meet for at least thirty hours over three days for a "time-on-task concentration of intelligence, energy, and emotion."

Thomas Hart (1988) recommends using several small groups to begin the planning process. Within these groups participants discuss, combine, and rank their goals for the district. Representatives from each group report to the larger body so that everyone shares a sense of cohesion and consensus.

Once the planning group enjoys a degree of consensus, it can release its goals to subcommittees that formulate objectives for each goal. They should specify when the task is to be completed and who is responsible for completing it.

Jerry Herman (1988) provides examples of how goals and objectives work. One such goal is to develop committees "to promote ownership and collaborative decision making in the district." One of several objectives for accomplishing that goal entails establishing "a policy advisory committee composed of representatives from all stakeholder groups." The person assigned to that objective and the date by which it should be completed can also be included in the plan.

Neither goals nor objectives should be solidified too quickly. The subcommittees in charge of formulating objectives may discover that some goals simply cannot be implemented. Furthermore, a careful cost-benefit analysis and forums for public response must occur before a district commits itself to a plan.

What areas should be included in a strategic plan?

Strategic plans are typically comprehensive. Hence they should include everything essential to a district's mission.

This is not to say that these documents must be exceedingly long and complex. Hart reports that Oregon's Centennial School District created an effective plan with but three broad goals: curriculum, instruction, and community. Joseph D'Amico (1988) demonstrates that strategic plans can be quite specific. He cites a Northeast school that, as part of its planning process, discerned that its major problems boiled down to student apathy and misbehavior. It chose to focus on identifying these problems' causes and formulating and implementing solutions.

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AASA recommends anticipating future trends. Wise planners will pay particular attention to demographic changes, shrinking financial support, strengthening their curriculums, and attracting, developing, and retaining effective teachers. They must also plan to more fully utilize computers and other new instructional technologies and to prepare students for a labor market that will favor white collar jobs over blue collar ones and service jobs over agricultural employment.

Who should be included in creating a strategic plan?

Authorities agree that everyone concerned with public education should participate in the planning process.

Janice Johnson (1989) describes a Phoenix school district's approach. Its twenty-five-person planning team included two board members, the superintendent and his six-person cabinet, nine parents (including four business people), two teachers, two principals, one support staff, and the presidents of the teacher association and citizen advisory group. Principals recruited community members for the fifteen committees that formulated objectives for the goals set by the planning team. Such an eclectic mixture, Johnson concludes, "taps new reservoirs of support and gets current supporters more involved."

A variety of formats encourages a variety of groups to take part. Board members might participate in the planning during a retreat, teachers during an inservice day, and students through a congress (Hart). The general public can articulate its concerns through public meetings and surveys. Some districts insist that community members constitute the majority of their planning committees to keep educators from dominating the planning process. Yet, as the AASA points out: "Educators have responsibility to lead the community toward desirable educational goals, not just to cater completely to community desires."

Cook asserts that the planning team should consist of one-third to one-half administrators, with its remaining members drawn from a broad section of the school community. Occupation should not, he stresses, be the only criterion for being selected to this important committee. Members should be articulate people of good will who will pursue consensus over special interests.

How should a strategic plan be implemented?

A strategic plan should be fully discussed and publicized before it is implemented. It is, as Hart points out, an opportunity to share the district's educational vision with the entire community.

The plan must also find its way into the district's budget and its job descriptions. Even the most carefully formulated document will be academic if sufficient money and time are not dedicated to meeting its objectives.

The people responsible for carrying out the plan's various objectives should report their progress on at least a quarterly basis. Deadlines and objectives can be modified or even eliminated, but not without thorough discussion by the district's leadership.

Strategic plans should be for at least five years. They should be reviewed annually, with a particularly thorough review at the end of the first year. Administrators should resist the urge to coast through annual reviews. These are the times to check the plan against what the district is actually doing and to make adjustments in either the plan or in how the plan is or is not being followed.

A strategic plan, after all, is not simply a document. It is a district's road map to the future. Its lines must always be true and clear.

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A Product of the ERIC Clearinghouse on Educational Management
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